OnviCord Monitor User's Guide Version 5

OnviSource, Inc.

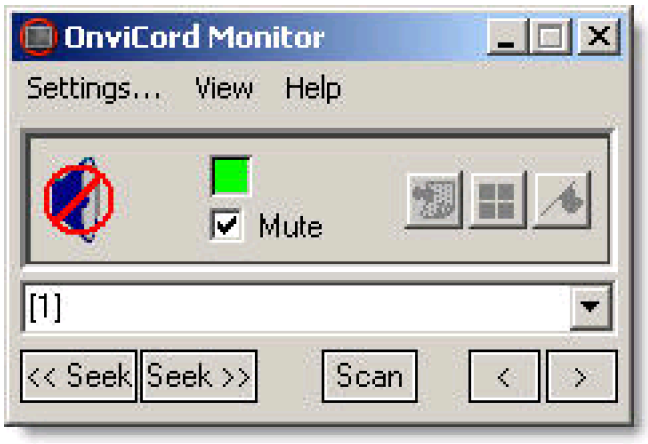
Headquarters:
1255 West 15th Street, Suite 500 Plano, TX 75075
Main: 469.241.9200 Fax: 469.241.0247

Operations:
2300 North 10th Street Enid, OK 73701
Main: 580.242.4636 Fax: 580.242.8255

www.onvisource.com

Getting Started

OnviCord Monitor enables supervisors or other authorized users to monitor live voice and screen activities in progress for quality assurance, training, or evaluation from virtually any location.



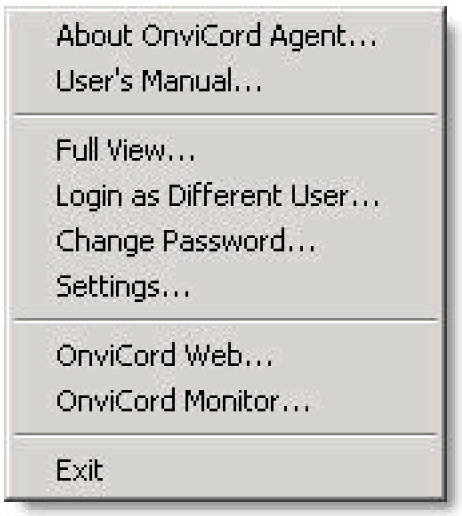
Before You Begin

You **must have** the latest Windows and Internet Explorer Service Packs installed on your system before continuing. Recent Service Packs are located in the Microsoft folder on the ***OnviSource*** CD. We also recommend that you monitor the Microsoft web site for updates that are appropriate for your system.

Depending on your operating system, the images shown in this document may be slightly different from what you see.

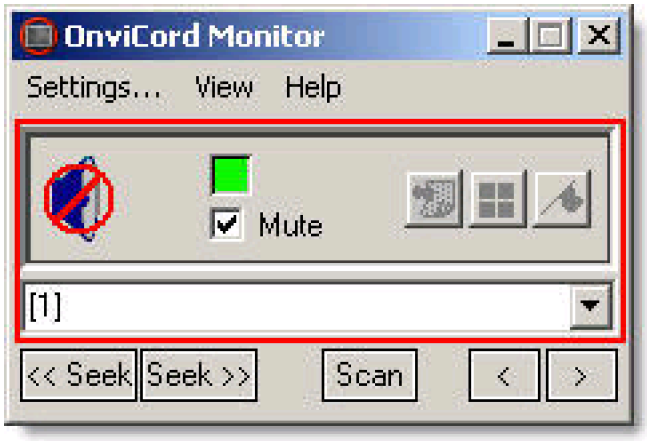
Log In

To log in to **OnviCord Monitor** from **OnviCord Agent**, right click the **OnviCord Agent** icon in your system tray and select **OnviCord Monitor** from the menu.



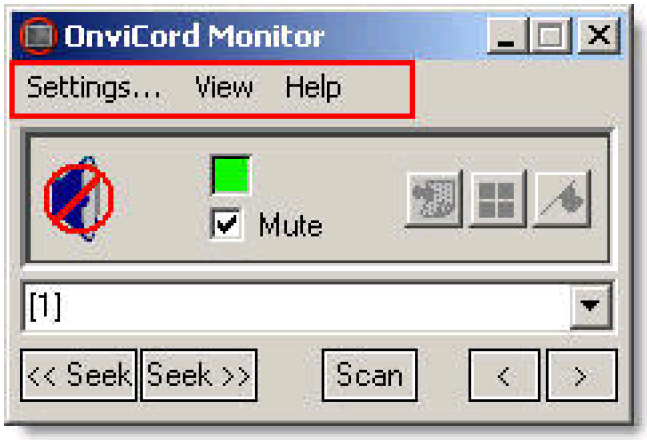
Main Window

The main window for **OnviCord Monitor** consists of a menu bar, current channel status area, (including a channel selection tool) and stereo-like buttons .



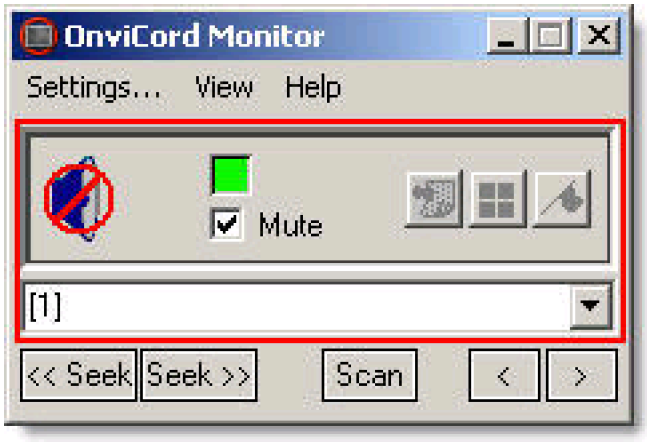
Menu Bar

The menu bar consists of three choices: Settings, View and Help .



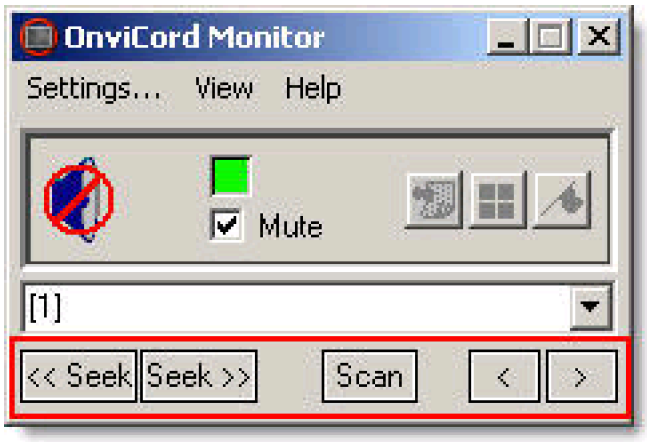
Current Channel Status Area

This area allows a user to start/stop remote live monitoring of the current user or channel (shown in the long white box), monitor a different user or channel, attach a note, designate a user-defined color code and/or flag a recording.



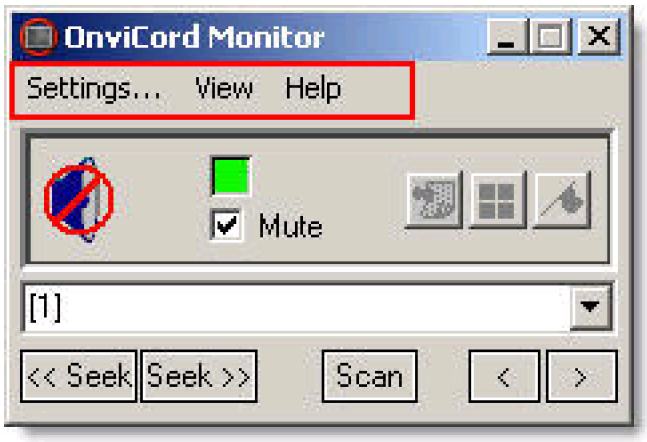
Stereo-like Buttons

Seek, scan and previous/next channel buttons allow you to select which users(s) and/or channel(s) to monitor.



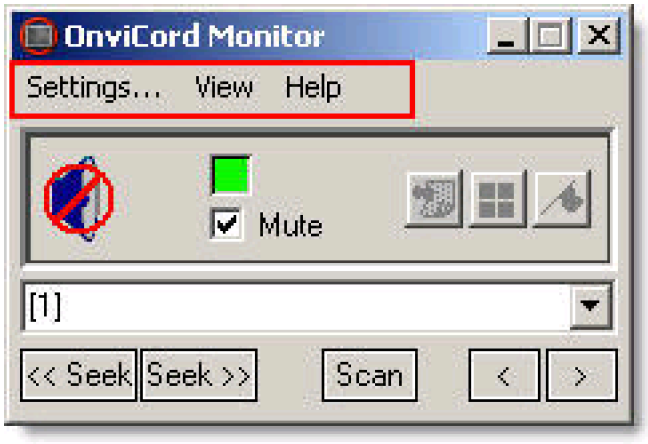
Menu Bar

From the Menu Bar, select Settings, View or Help.



Settings

Use the Menu Bar to select Settings.



Settings launches a box for setting a user's scan hold time. When set to scan channels for activity, the scan hold time represents the number of seconds (5-60) that your system stays on a channel once it finds one with activity before advancing to the next active channel. To modify the number of seconds, enter your preferred scan hold time by typing a number in the box or using the up/down buttons to increase/decrease the number of seconds. Click OK.

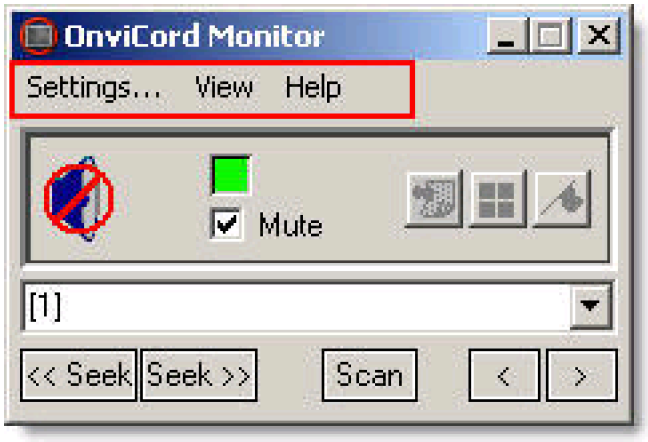
Your OnviCord system administrator determines which channels you have permission to monitor. To include your own channel in the list of available ones to monitor (if this option is available), place a checkmark next to Show Your Channel/ User.

Put a checkmark next to always on top if you want the **OnviCord Monitor** window to remain on top of other applications you are running. When this option is selected, you can close the **OnviCord Monitor** window at any time by clicking the X in the upper right corner.

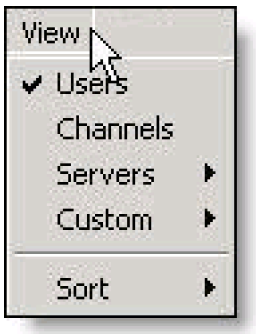
View

When **OnviCord Monitor** is launched from **OnViews**, the application defaults to the same view/sort order being used in **OnViews**. For example, if you are viewing users by Last Name/First Name in **OnViews** when you launch **OnviCord Monitor** from within **OnViews**, then **OnviCord Monitor** will default to the Last Name/First Name view.

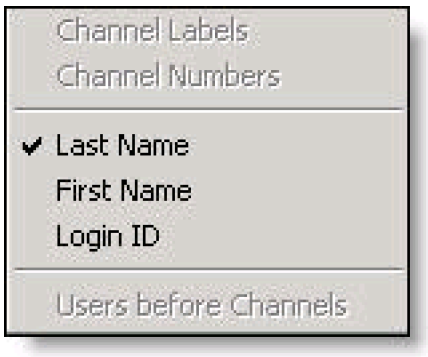
To choose between views, select View from the Menu Bar.



Now select users, channels, servers or a user defined custom view (configured in **OnViews**).

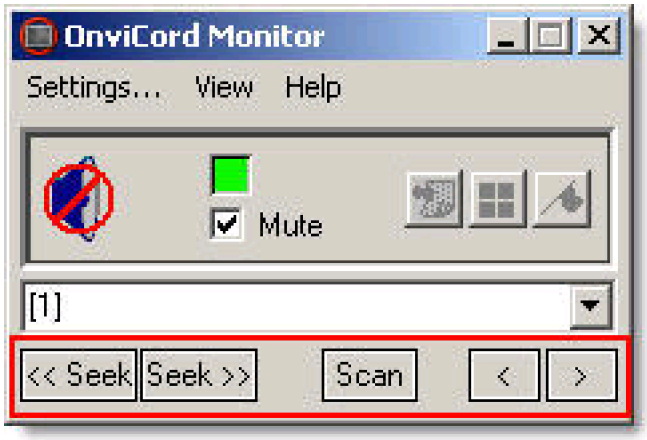


To change the sort order for a category (users, channels, etc.), select the category. Then select View and Sort. Only applicable sort criteria is shown (user sort options when viewing users, channel sort options when viewing channels, etc.). All views automatically default to the first item in that category (user, channel, server or a custom setting) that you have access to view.



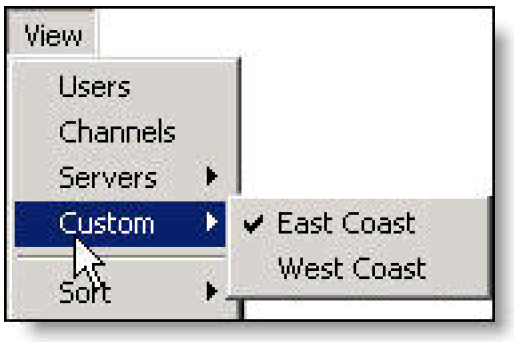
In user view, you can seek or scan by user name ***OR*** use the drop-down box to select a specific user to monitor. Users are listed (by default) alphabetically by last name, and only users you are authorized to monitor are displayed. Even if a user is logged out or idle, you can monitor the channel. When the user logs in and starts recording, you will hear it.

In channel view, you can seek or scan by channel ***OR*** use the drop-down box to select a specific channel to monitor. Channels you are authorized to view are listed by label alphabetically if assigned a label, then numerically for channels without labels. Even if there is no current activity on a channel, you can monitor it. When a recording begins, you will hear it.



In Server View (*if applicable*), you can view channels on one server or all servers. Only servers you have access to appear under this selection.

Select Custom View (configured in **OnViews**) and select the one you wish to use.

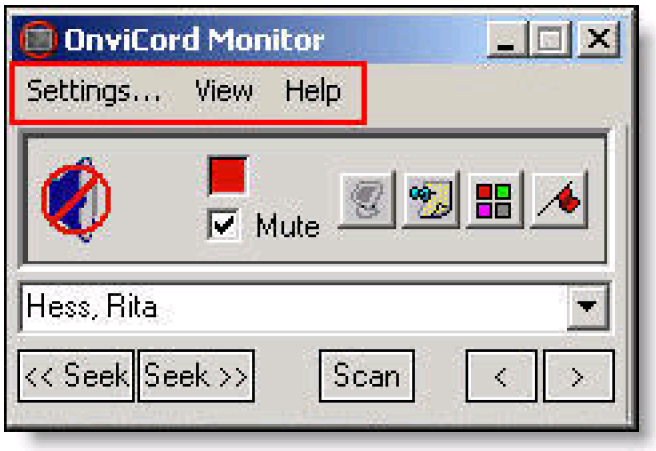


With custom views, it is possible to view any combination of users/channels for which you have permission to access. User/channel combinations are listed as follows: users alphabetically, labeled channels alphabetically, channels numerically if not labeled. The seek and scan buttons and the drop-down box operate the same as if viewing just users or just channels.

Regardless of which view you choose, you can arrange the sort order by channel labels or numbers (in channel view), user last name, first name or login ID (in user view), or to show users before channels in a custom view that combines both users and channels.

Help

Click help from the menu bar to see what version of **OnviCord Monitor** you are running and to access this User's Manual.

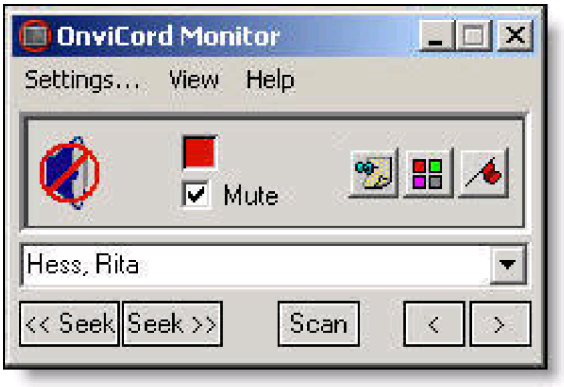


Selecting Start->Programs->OnviSource from your desktop also allows you to open the **OnviCord Monitor** User's Guide.

Current Channel Status Area

This area allows a user to start/stop remote live monitoring of the current user or channel (shown in the long white box), monitor a different user or channel, attach a note, designate a user-defined color code and/or flag a recording .

The color of the square (above the mute checkbox) indicates the status of the channel or user shown.



The following table describes each icon and its meaning.

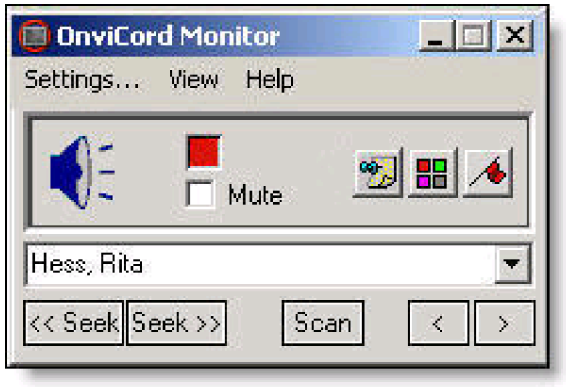
Channel Status Icon Color Key

COLOR	ICON	MEANING
Light Green		Idle, ready to record
Dark Green		Logged out
Red		Recording
Red with Checkmark		Recording; current recording will be flagged
Red with Cross Out Bar		Record limit (not enough licenses for another concurrent recording); contact a Davacord sales representative **OR** license expired*
Light Grey		Off, no recording will take place
Yellow		Connected to recording server but no recording status received **OR** connected to file server but no channel

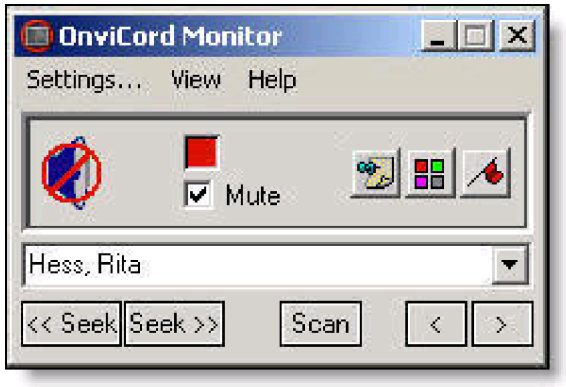
Black		No phone line detected; connection to PBX lost. Check wiring (digital extensions only); refer to Troubleshooting Guide on Installation CD
Purple		Incompatible version of software
Olive Drab		Exceeded total licensed users
Orange		Recording tried to start but failed; contact your System Administrator

**On systems equipped with an expiring license feature:* authorized users can continue to search for and play existing recordings after a license expires but NO new recordings are created.

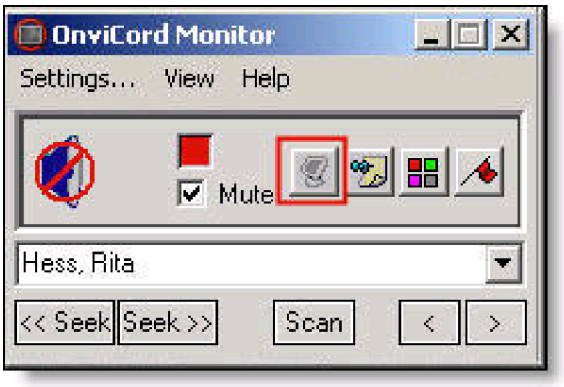
On a channel with recording activity (a red icon), the speaker symbol indicates you are currently monitoring the live call.



Place a checkmark in the mute box to quit monitoring a recording. The checkmark and the cross-out bar over the speaker indicate you are no longer monitoring the live recording. Uncheck the mute box to begin live monitoring again.



For systems with screen capture where a recording is being live monitored, an additional icon (a computer monitor) appears to indicate that screen capture is also taking place on the call. Click on the icon (unless it is dimmed) to launch the video monitor.



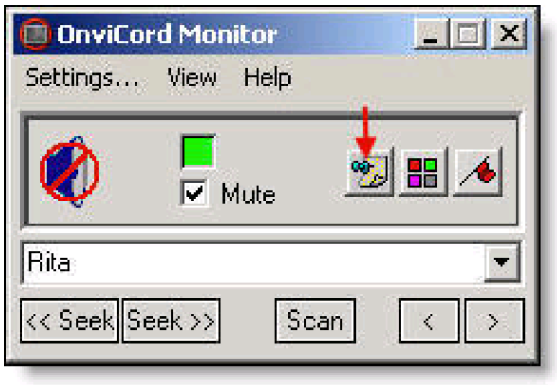
You may briefly see a black screen that indicates video monitoring is about to begin, followed by the launch of the video monitor window showing the entire screen of the user whose recording you are monitoring. Seek, scan and previous/next channel arrows all work while the screen is up, and the actual video monitor screen can be moved and re-sized during video monitoring.

Check the mute box to quit live monitoring the screen capture, or uncheck the mute box to begin live monitoring again.

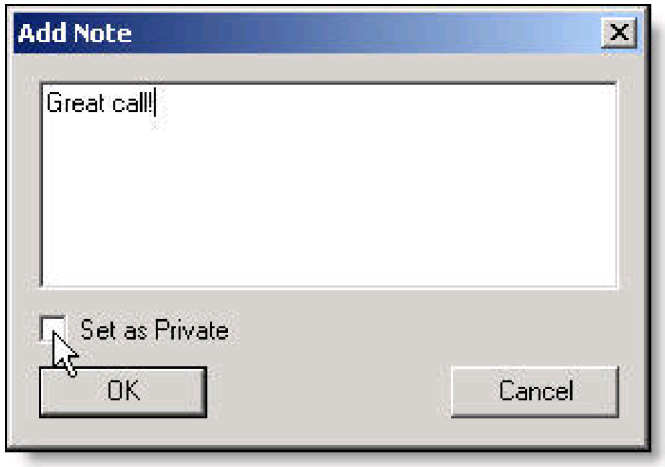
Attach a Note

Notes provide a way for authorized users to attach text to a recording during or after the recording.

Click the Note button (first icon) in the current channel status area, enter text in the box, set the note as Public or Private*, and click OK. The user adding the note and the current date/time are stamped onto the new note, and it becomes part of the recording history in **OnviCord Web.**



*Access to Private notes is granted by your system administrator.



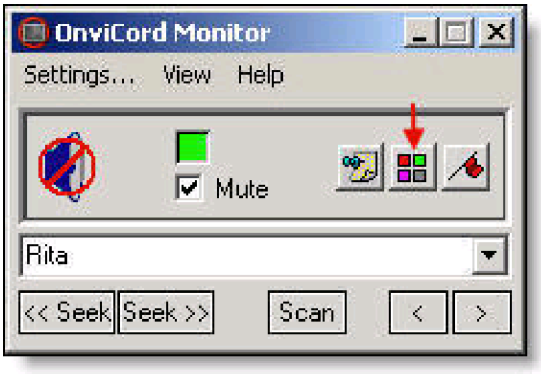
QUESTION: I attached a note to a call. Can someone else attach a note to it, also?

ANSWER: Yes, someone else can attach a note. In fact, there is no limit to the number of notes for each recording. For example, you attach a note to a recording about a customer who is interested in your product, then you launch **OnviCord Web** and forward the recording to your supervisor. After reviewing the call and note, she decides the Sales Manager should contact the customer. She adds a note indicating her decision, and uses **OnviCord Web** to forward the recording (with both notes) to the Sales Manager.

Color Codes

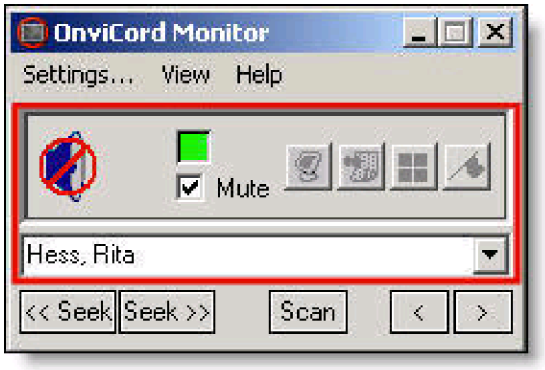
This unique feature allows authorized users to define color codes that can be applied to recordings. Color codes are configured in **OnviCord Web** .

To apply an existing color code (if applicable in your organization), click the color code button (second icon).



Select the color code you want applied.

When applying a color code, the colored square in the current channel status area **does not** change. There is no visible indication in **OnviCord Monitor** that the recording has been color coded.



Even if a recording has ended, you can add an additional color code **if no subsequent recording has started**.

QUESTION: What if I forget to designate a color code before the call ends?

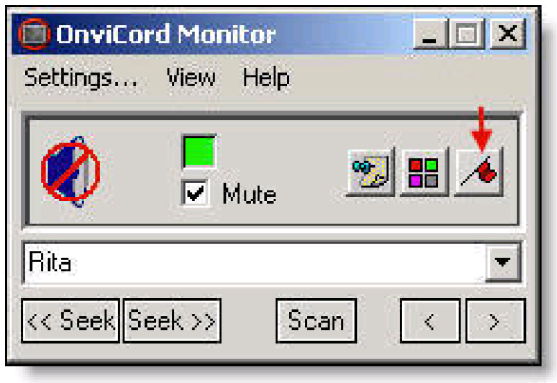
ANSWER: Even if a recording has ended, you can add a Color Code **if no subsequent recording has started** by clicking the Color Code icon. The color code is entered into the database for the last recording made.

QUESTION: What if I choose the wrong color code?

ANSWER: When you choose a color code and click OK, that color code is applied, but you can left-click, re-open the color code menu, and select a different color code. Both choices are reflected in the Recording History section of **OnviCord Web** , but the **last** color code applied is what appears when performing a search or viewing recent recordings.

Flag a Recording

Click the Flag button (third icon) to flag the recording you are monitoring or just finished monitoring.



When you flag a call, a checkmark appears in the square icon. This flags the call in the database, making it much easier to locate later.

QUESTION: What if I forget to flag a call before the recording ends?

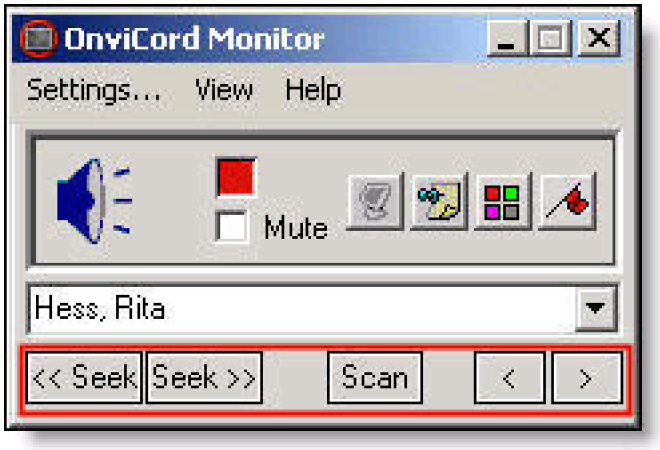
ANSWER: Even if a recording has ended, you can flag the call **if no subsequent recording has started** (and you haven't changed to another user or channel). The flag is entered into the database for the last recording made.

QUESTION: What if I flag a call by mistake?

ANSWER: After the recording is finished, locate it using Recent Recordings or Search in **OnviCord Web** . On the results page, click the Flag column associated with that recording and select Remove Flag.

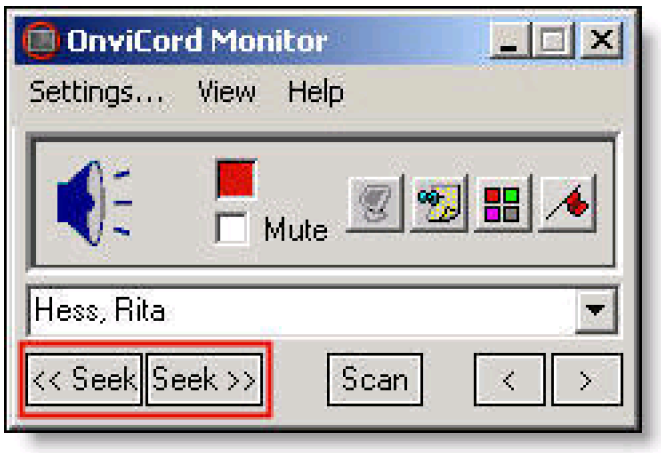
Stereo-like Buttons

Seek, scan and previous/next channel buttons perform much the same as many car stereos for locating radio stations.



Seek

The first set of seek buttons seeks previous (left) and next (right) users and/or channels you are authorized to monitor. As you seek, user and/or channel names/numbers flash in the long white box. Whether you see users, channels, or both depends on your View.

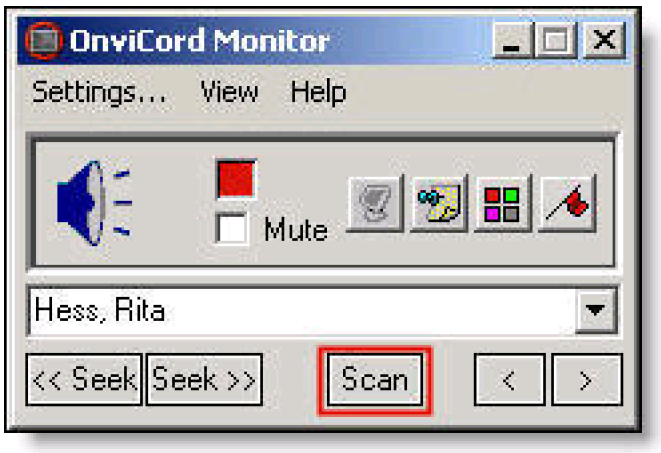


When seeking in either direction, **OnviCord Monitor** continuously moves through channels and/or users until it finds one with activity that is being recorded. It then stops and remains there even after the recording is finished. You will know where **OnviCord Monitor** found activity and stopped because the user name or channel label will appear in the current channel status area.

When *active.Monitor* stops on a user or channel with activity, uncheck the Mute box to begin live monitoring or check the Mute box to quit live monitoring. Press the note icon if you want to attach a note, press the color code icon to apply a color code, and/or press the flag icon to flag a recording in progress. Press one of the seek buttons again to start/stop the seek action.

Scan

This button scans users and/or channels you are authorized to view until it finds one with activity. As you scan, user and/or channel names/numbers flash in the long white box. Whether you see users, channels, or both depends on your view settings.

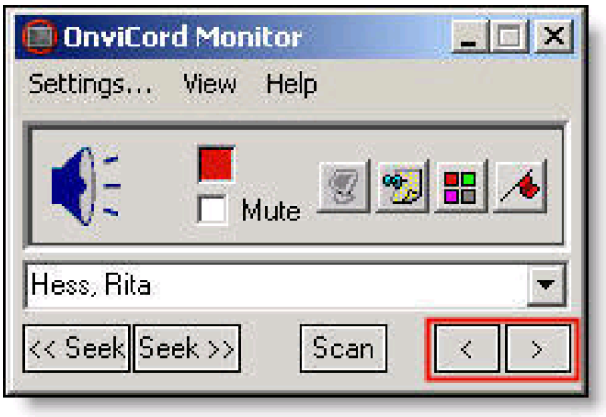


When scanning, **OnviCord Monitor** continuously moves through channels until it finds one that is actively recording. It then stops on the active channel for the number of seconds you designate in settings. You will know where **OnviCord Monitor** found activity and stopped because the user name or channel label appear in the current channel status area.

When **OnviCord Monitor** stops on an active channel, uncheck the Mute box to begin live monitoring or check the Mute box to quit live monitoring. Press the note icon if you want to attach a note, press the color code icon to apply a color code, and/or press the flag icon to flag a recording in progress. Once the Scan Hold Time you selected in settings has elapsed, **OnviCord Monitor** begins scanning for the next active channel. Press the scan button again to stop/start the scan action.

Previous/Next Channel

Click the previous or next buttons on the far right to move incrementally to the previous user/channel (left arrow) or next user/channel (right arrow) you are authorized to monitor.



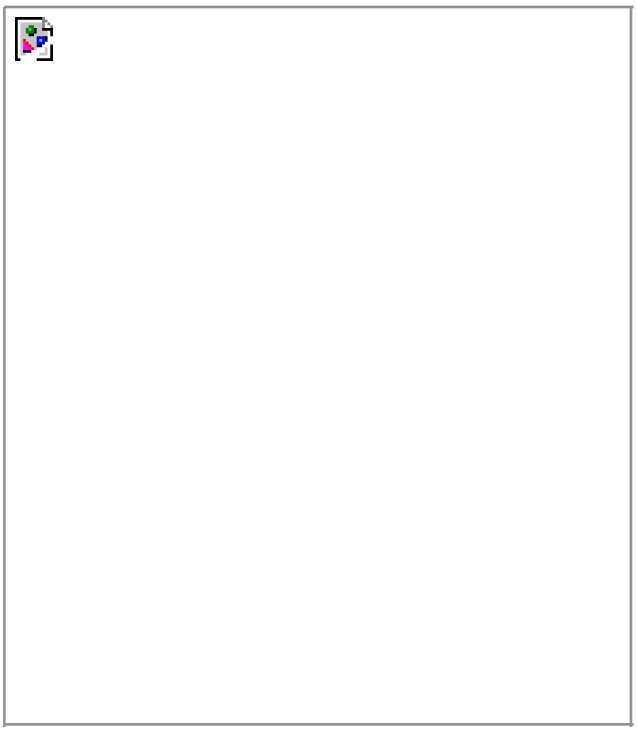
When stopped on a channel with recording activity, uncheck the Mute box to begin live monitoring or check the Mute box to quit live monitoring.

Press the note icon to attach a note, press the color code icon to apply a color code, and/or press the flag icon to flag a recording in progress. Press the previous or next button again to stop/start the action.

HINT: To seek or scan channels without live monitoring each active channel, put a checkmark in the Mute box. Seek or scan as described above. With this method, you will not begin hearing an active recording until you uncheck the Mute box.

Channel Selection Tool

You can seek or scan channels for activity, or you can select one to monitor using the drop-down box.



Whether you see users, channels, or a custom view when the drop-down box opens will depend on your view setting .

Seek

The first set of seek buttons seeks previous (left) and next (right) users and/or channels you are authorized to monitor. As you seek, user and/or channel names/numbers flash in the long white box. Whether you see users, channels, or both depends on your View.

When seeking in either direction, **OnviCord Monitor** continuously moves through channels and/or users until it finds one with activity that is being recorded. It then stops and remains there even after the recording is finished. You will know where **OnviCord Monitor** found activity and stopped because the user name or channel label will appear in the current channel status area .

When **OnviCord Monitor** stops on a user or channel with activity, uncheck the Mute box to begin live monitoring or check the Mute box to quit live monitoring. Press the note icon if you want to attach a note , press the color code icon to apply a color code , and/or press the flag icon to flag a recording in progress. Press one of the seek buttons again to start/ stop the seek action.